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ACCOUNTING & AUDIT

Conquering Tax Season from the Cloud

Forward-thinking firm harnesses the power of leading cloud-based tax solution to ease the pain of tax season...and beyond

Kristy Short, Ed.D • May. 27, 2013



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The firm of Bernard N. Ackerman, CPA, PA (BNA) has long been on the technology bandwagon. Firm owner, Bernard (Bernie) Ackerman, has always held tight to his assertion that technology is an essential element of a successful firm.

Bernard N. Ackerman, CPA, PA, Certified Public Accountants

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“I consider our firm tech-savvy,” Ackerman stated. “We work very hard to stay ahead of technology changes so we can continue to operate at peak efficiency.”

In fact, BNA started its paperless journey well over a decade ago. Ackerman explained that the firm’s first step into the world of paperless began with moving to digital document storage. “It all started with our attempt to automate document filing. We knew we could be more productive if our documents were stored electronically.”

After implementing a third-party electronic file storage application, the firm started to realize the value of working digitally, which all but eliminated manual filing and searches.

Fast-forward to today and BNA is firmly in the Cloud. The firm first adopted CCH’s SaaS-based practice management solution, and in 2012 implemented CCH’s newly launched SaaS tax solution—CCH Axxess.

“A lot of firms would not have adopted a newly released cloud-based tax solution just before the start of tax season, but based on our positive experience with CCH’s SaaS practice product, we figured, why not?” explained Ackerman. “Axxess is dynamite! We process approximately 1,600 individual returns and 300 business returns, and we had very few problems...even with the late e-filing start.”

At the helm of a technology-driven firm, Ackerman explained that practitioners must consider technology improvements beyond just applications if they are to realize true efficiency gains.

“Four monitor workstations are standard in our firm. We also make good use of video conferencing with Face Time to stay in contact with clients, conduct interviews, and communicate in real-time firm wide. Firms have to consider the entire technology picture...there are lots of pieces and parts. Our system is solid, which helped us experience a relatively painless tax season.”

While his firm covers all the bases in regards to technology, Ackerman is generous in his praise of CCH Axxess and the part the solution played in easing typical tax season issues. “It’s a wonderful cloud-based tax solution, and *in the cloud* is where we want to be. Support for the product is also fantastic. Support folks have worked closely with us to improve speed.”

Beyond Tax Season Efficiency Gains

Ackerman’s vision for technology doesn’t stop at internal tax process improvement. He also understands technology enables his firm to offer value-added client services, enhance the client accounting process, and reduce IT costs.

Offering clients higher-value services is core to BNA’s business model. And in order to provide these elevated services, Ackerman knows that his staff can’t be mired down with manual tasks.

“We are a firm of 16 full-time staff members, and 12 of those are CPAs,” Ackerman explained. “Because we’ve developed a streamlined system, we don’t have the need for a large administrative staff to handle manual duties. This frees us to hire more CPAs who can focus on higher-value client services like consulting and strategic planning.”

Offering high-end options serves to strengthen the firm’s role as the clients’ most trusted advisor. And more and more, clients are requesting consultative services. “Clients want year-round strategic planning. They look to us for advice and guidance. And this is the type of relationship we want to build with our clients.”

Ackerman explained that his firm is now focused on streamlining the client accounting process as well. The goal is to support a completely cloud-based workflow to more efficiently serve clients.

“The plan is to move completely to the online versions of client accounting software, like Peachtree and QuickBooks Online. We don’t want to be in the hosting business, maintaining multiple versions of software. We want to be in the Cloud where everyone is using the same system and data flows seamlessly from initial entry on the client’s end to document delivery through portals. This will support real-time collaboration with clients.”

Ackerman added that his firm uses CCH Portals to securely deliver their clients’ tax and accounting documents. “It’s one more critical element of our technologically advanced internal system.”

Reducing IT costs is another goal at BNA, and Ackerman knows that moving to the Cloud is how to accomplish it. “The more technology in a firm, the stronger the need for IT support...whether it’s an onsite person or outsourced. Cloud technologies are a great alternative for minimizing IT costs.”

What’s Next for BNA

A true visionary, Bernie Ackerman knows that you can’t take your eyes off of technology for very long. “The minute you do, it changes. We want to stay up-to-date on changes and make sure we are always operating as efficiently as we can and offering the most sophisticated level of client services possible.”

BNA is partially in the Cloud today—having migrated from the on-premise versions of practice and tax solutions to SaaS. And the journey is not over.

“We are very encouraged by CCH’s commitment to offering an open platform. This promises a world of opportunity for building a fully integrated solution set, whether we are using all CCH products or not. They’ve worked with our firm to help us integrate a third-party legacy product so all our applications can ‘talk’ to each other,” explained Ackerman.

Ackerman’s grand vision is to work on a system that runs completely within a browser. “I want to see all products running from a browser. This would allow us to work not only from anywhere and at any time, but also from any device of our choosing...and we love our iPads here!”

With Ackerman leading the charge, there is no doubt that BNA will remain in the vanguard of technology-adept firms and that his goal of working entirely in the Cloud will come to fruition.

“It’s the way the profession is moving,” Ackerman said. “The Cloud is where vendors are committing their resources, and where firms will find the most advanced solutions. That’s what we discovered by adopting a cloud-based tax solution, and we have a relatively smooth tax season under our belt to prove it.”

About the Author

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